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ABSTRACT

This document describes the implementation and evaluation of a 2-week workshop designed to help the faculty of the National Institute of Public Administration (Lahore, Pakistan) develop case studies and accompanying teaching notes for use in their classes. The workshop, which was facilitated by the author, resulted in the development of nine case studies and notes, with three more cases and notes near completion. The document contains an executive summary; description of the scope of work; description of revision of cases developed under similar circumstances the previous year; description of development of the new cases; description of the case facilitation workshop, including its objectives; description of the workshop evaluation; seven recommendations; and eight appendices. The appendices consist of a list of the author's activities in support of the scope of work; agenda for the case study workshop; outline of the case study facilitation workshop; six references; workshop handouts; instrument for formative evaluation of the workshop; formative evaluation results; instrument for summative evaluation of the workshop; and the results of summative evaluation. (CML)

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FACILITATION OF CASE STUDIES WORKSHOP

and

PAKISTAN-SPECIFIC CASE DEVELOPMENT FOR THE ADVANCED MANAGEMENT COURSE IN PUBLIC ADMINISTRATION PHASE 2

at the

NATIONAL INSTITUTE OF PUBLIC ADMINISTRATION (NIPA)
LAHORE, PAKISTAN

January 18 - February 3, 1990

FINAL REPORT

Sponsored by:

Management Training Division
Academy for Educational Development
Washington, DC, and Islamabad, Pakistan
under contract with
USAID

Consultant:

Dr. Gary N. McLean
Professor and Coordinator
Training and Development
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February, 1990

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EXECUTIVE SUMMARY

This two-week workshop with the faculty of NIPA-Lahore was designed to continue the emphasis begun last summer in case study development, with the expectation that each faculty member would complete one additional case study with accompanying teaching note, and to focus on appropriate case study facilitation skills.

The workshop design included a two-day presentation on case development, which included a presentation of a case for modelling purposes and the use of commercial videotapes on case study facilitation, followed by each participant facilitating the additional case that he or she had developed. These presentations were videotaped (so far as load shedding permitted), and the consultant met with the facilitator privately to review the videotapes. Thirteen members of the faculty participated at various stages, including the Director.

By the end of the workshop, nine additional case studies with teaching notes had been developed, with three more close to being finished. All cases still need an additional edit before they will be ready for publication. They are to be forwarded to NIPA-Lahore for publication purposes no later than March 1.

Reaction evaluations were completed by the faculty following the two-day presentation. All items exceeded 4.0 on a five-point scale except for the value of the commercial videotapes (3.8). Reaction evaluations were also completed by the faculty at the completion og the entire two weeks. Again, all items exceeded 4.0 except for the commitment of the faculty to complete at least one more case during the next year (3.6). Overall satisfaction was high with a formative satisfaction rating of 4.6 and a summative rating of 4.5.

Major recommendations arising from the report include: continuing to have the case study facilitations of the faculty videotaped with a videotape camera provided to facilitate this activity, especially in the Advanced Management Course, with invited colleagues assisting in reviewing the tapes; completing the editing of the cases and teaching notes for publication; advertising the availability of the publication when completed; developing specific implementation steps for the materials clearinghouse; developing plans for an annual publication of case studies developed each year; offering NIPA-Lahore faculty a parallel workshop opportunity in research methodology; and implementing recommendations from the previous report that have not yet been implemented.

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SCOPE OF WORK

This report covers the second visit of the consultant to the National Institute of Public Administration (NIPA)-Lahore. The first visit (see McLean, 1989a) established the project's original purpose:

> To provide on-site consulting assistance to NIPA-Lahore to develop Pakistan-specific cases to support various phases of the Advanced Course (in Management) and for the proposed materials clearinghouse project. (p. 1)

The Academy for Educational Development (AED) established a minimum objective of four completed cases with teaching notes. The project actually resulted in six publishable cases with teaching notes.

The report of the first visit also contained a number of recommendations. Those that apply specifically to the second visit are:

> continuing the current effort by having the consultant review drafts of the contracted cases, return them to faculty for revision, and then return for a short workshop (about two weeks, to include facilitation skills) when the revisions have been submitted. (McLean, 1989a, p. i)

In the interim between the two visits, three cases were completed and forwarded to the consultant for review and critique.

Three specific objectives were developed for this second visit:

1. to finalize the cases completed during the first visit for publication;
2. to provide support to faculty to complete the cases which they had committed to writing at the conclusion of the first visit; and
3. to present a workshop on facilitation of case studies to assist faculty in improving their skills in using cases in a classroom setting.

The emphasis for case development was on publishable cases and teaching notes since NIPA-Lahore intended to publish a book of cases that could be used by their participants, and by participants in other NIPAs and appropriate training programs. They also intended to provide a separate publication of related teaching notes.

Day-by-day activities in support of these objectives are provided in Appendix A. The published agenda for faculty is provided in Appendix B.

REVISION OF CASES PREVIOUSLY DEVELOPED

During the previous visit, six cases were substantially completed (McLean, 1989b). However, some minor details remained to be clarified. On this visit, clarification was made on each case to insure its readiness for publication.

DEVELOPMENT OF ADDITIONAL CASES

At the conclusion of the first visit, each faculty member had made a commitment to complete one additional case individually by October 1. Twice that date was extended in consultation with the Director of NIPA-Lahore. In spite of such extensions, only three cases were forwarded to the consultant; and they were received only two weeks prior to departure for the second visit. Further, these cases required considerable revision if they were to be of publishable quality. It was felt, therefore, that it would be helpful to have the consultant return to provide motivation to the faculty who had not yet completed their case and to provide detailed assistance to those whose case was completed, but who needed help in improving it.

Thus, throughout the two weeks, the consultant met with individual faculty members following the format of the first visit. Assistance was offered in identifying appropriate agencies and resources for data collection for those who had not yet developed a case for review. Detailed feedback was provided and editorial suggestions were made for those who had completed a case.

The cases developed in stage two provided the material to be used during the case study facilitation workshop component of the second visit. This provided an opportunity for the cases to be pilot-tested to identify additional changes that were needed.

This process resulted in an additional 9 cases being completed, with three more in close to finished shape, to bring the total of publishable cases with teaching notes to 18. With this number, NIPA-Lahore will proceed to have the cases published, along with a separate publication of respective teaching notes.

CASE FACILITATION WORKSHOP

The objectives established for the case facilitation component of the project were:

Upon completion of the workshop, participants will be able to:

1. Select an appropriate case for use;
2. Introduce the case method to students;
3. Use and introduce appropriate small group processes in discussing cases;
4. Facilitate large group discussion, keeping the class on track and maintaining good group process, but without controlling or directing the discussion;
5. Provide an appropriate summary of the case; and
6. Provide appropriate feedback to the group and to individual participants.

The specific content of the workshop is provided in the outline (Appendix C) and the supporting handouts (Appendix D). Several modalities were used, as indicated by the workshop activities: brainstorming, lecture, discussion, handouts, videotape, demonstration and modeling, practice and feedback.

The sequence was to spend one and a half days on the process of facilitating a case study (objectives 1-5), followed by a half day in which the consultant facilitated a case developed during phase 1 (Iftikhar Ahmad, "Basic Manufacture of Pharmaceutical Raw Materials," in McLean, 1989b, pp. 46-63) to model appropriate facilitation of a case.

The remainder of the workshop consisted of faculty facilitating a case that they had developed the previous week. The facilitation was videotaped for later review with the consultant. Portions of the large group discussion which were included in the videotaping were also reviewed with the full faculty to provide them with feedback on their group process skills (objective 6). Opportunity was also given each day for the faculty to provide feedback to the case writer on areas that might need improving in the case itself. Thus, each case writer received feedback on both case facilitation and case writing from the same case presentation.

WORKSHOP EVALUATION

The workshop was evaluated at two points: formative evaluation was conducted at the end of the first two days' activities (Appendix E), and summative evaluation was conducted at the conclusion of the workshop (Appendix G). The respective results of the evaluations are summarized in Appendices F and H.

In the formative evaluation of the two-day in-class consultant's presentation, 10 of the 12 participants completed evaluation forms. Individual items ranged from 3.8 to 5.0 on a 5-point scale in which five is the desired response. Generally, an

average of 4.0 is considered to be a rating that indicates a high degree of satisfaction with an item. The only item to fall below 4.0 (3.8) was related to the videotapes (Heath, 1989a and 1989b). It may be that the cultural context (England), speed at which the language was spoken, and the diversity of views expressed on the tapes all contributed to this lower rating. However, one respondent indicated that the videotapes were one of the best parts of the workshop, and 7 of the 10 respondents agreed that they were worthwhile to have been included. All other items were 4.5 or higher, with an overall evaluation of 4.6.

Only one item was listed in the open-ended responses for improvement--starting on time. I am in wholehearted agreement with this suggestion, but it seems to be outside the norm of the faculty of NIPA-Lahore to do this. All of the responses for what they would like to see included in the remaining time had already been included. The only exception was that participants wanted more time. Given the consultant's time constraints, that request could not be met. However, arrangements were made to continue providing assistance in the writing of cases throughout each of the remaining days.

In the summative evaluation of the entire workshop, 10 of the 12 participants completed evaluation forms. Individual items ranged from 3.6 to 5.0 on a 5-point scale in which five is the desired response. As before, an average of 4.0 is considered to be a rating that indicates a high degree of satisfaction with an item. The only item to fall below 4.0 (3.6) was related to the commitment level of participants to complete at least one more case during the next year. Only four of the respondents agreed with this statement. This is a concern because it is an indication that the skills developed during the two visits may not be continued. It may be that additional incentives will be necessary for the faculty to continue developing cases. All other items exceeded 4.0, with four items rated at 5.0 and an overall evaluation of 4.5.

The open-ended responses for improvement were minimal--one respondent referenced the facilities and two desired more time. One respondent indicated a desire to have the videotape reviews and feedback done with the entire group. I would resist this recommendation. It is difficult enough for many people to see themselves on videotape and to receive critical feedback. To do this in public would not be acceptable.

RECOMMENDATIONS

The following recommendations should be considered:

1. Faculty at NIPA-Lahore should be encouraged to continue

having their case study facilitations videotaped, especially in the Advanced Management Course. It would be helpful if invited colleagues would be willing to review the tapes with each individual to continue to identify ways in which such facilitation could be improved. If this recommendation is to be implemented, NIPA-Lahore needs to have a video recorder provided.

2. Nine cases and teaching notes developed during this visit are in close to finished condition, though they still need a final edit. Three cases will need a week or two yet before they are completed. These should be completed and final editing done as soon as possible so that final manuscript of all cases and teaching notes completed, from last summer and this visit, can be returned to NIPA-Lahore no later than March 1 for printing and publication.

3. Following publication of the cases and the teaching notes (in two separate publications), NIPA-Lahore needs to advertise its availability widely, to other NIPA's and other public administration-type institutions in South and Southeast Asia. Indeed, it may even find a market in western institutions attempting to internationalize their public administration programs.

4. If NIPA-Lahore is to establish itself as a materials clearinghouse, planning needs to move beyond the talking stage with the development of specific implementation steps.

5. Assuming that faculty continue to develop case studies, NIPA-Lahore may wish to develop plans for an annual publication of case studies developed during the year. It may also be necessary to provide financial incentives. These incentives would provide continued impetus for faculty to write case studies and encourage them to have continually updated cases available for use.

6. The Director, NIPA-Lahore, has rightly observed that the emphasis for in-service within NIPA-Lahore has been on the teaching charge of the institution. The other charge, which has been overlooked, is the research charge. He has suggested, and I concur, that a parallel to the current case study project could be undertaken with a research focus. That is, a workshop on research methodology could be conducted, followed by direct, consultant-faculty research undertakings. As before, a second visit will probably be necessary to reinforce the previous workshop and to assist in finishing up ongoing studies. An outcome of this project might also result in a publication of research summaries, similar to that obtained in my work in Bangladesh (see, e.g., McLean & Ahmad, 1989). Improving the research arm of NIPA-Lahore will improve the content of the Advanced Course

and should improve the teaching skills by providing faculty with more experience in the work environment of the course participants.

7. As best I can determine, the following recommendations from McLean (1989a) have not yet been addressed: 1 (objectives for the Advanced Management course), 3 (involvement of NIPA faculty in other locations in case development), and 4 (library resources in case studies and depository for consultant reports). I was unable to locate a copy of the report of my previous visit or the completed cases and teaching notes anywhere within NIPA-Lahore.

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APPENDIX A
DETAILED ACTIVITIES OF CONSULTANT IN SUPPORT OF THE SCOPE OF WORK

Pre-Departure - Review and critique three cases received prior to departure: Karamat Azim, "Abadan Institute Carpentry Shop"
Azra Rafique and Zill-e-Huma, "Strategic Advantages of Information Technology"
Rehane Samad, "Administrative Delays: Decisions Networking"
Locate, review, and purchase videotapes for case facilitation workshop
Identify, locate and review resources for case facilitation workshop

January 18 - Depart Minneapolis/St. Paul; arrive Boston
Depart Boston

January 19 - Arrive and depart London

January 20 - Arrive Karachi
Depart Karachi; arrive Lahore
Meet with Muhammad Amjad, Chief Instructor, to discuss scope of work
Review and critique case study by Muhammad Amjad, "The Resource Dilemma, Part I"
Meet with Mohammad Talha, Management Training Specialist, AED, to discuss scope of work

January 21 - Meet with Muhammad Amjad; Mohammad Talha; Mushtaq Ahmad, AED Punjab Representative; Iftikhar Ahmed, Workshop Coordinator; Mohammad Safdar, Assistant Workshop Coordinator; and Muhammad Akram, Audio-Visual Coordinator to work out detailed agenda
Meet with Manzoorul Hasan, NIPA Director, to review detailed agenda
Participate in first day's activities with NIPA faculty to establish workshop agenda and activities and establish times for individual consultations
Meet with Mansoor Mahmood to review planned case study development (two cases planned)
Review case entitled, "Purchase of Romanian Buses," by Khalid Jawed, for use in the Pakistan Administrative Staff College workshop and for possible use in the facilitation workshop at NIPA-Lahore
Review file of materials on dismissal for Mansoor Mahmood to determine appropriateness for case study development
Review 1989 cases completed for final review with faculty

January 22 - Meet with faculty to provide feedback on new cases, determine if changes are needed in 1989 cases and

teaching notes, and explore additional cases:
Karamat Azim
Azra Rafique and Zill-e-Huma
Muhammad Amjad
Naheed Riaz and Sajjad Mahmood
Mansoor Mahmood
Iftikhar Ahmad

Review and critique case study by Muhammad Safdar, "Socio-Economic Development of Cholistan"

Review and critique case study by Shamsher Khan, "More Black Gold and How?"

Review Iftikhar Ahmad's interview notes on "Police Behaviour and Effectiveness in Relation to Crime"

January 23 - Meet with faculty to provide feedback on new cases, determine if changes are needed in 1989 cases and teaching notes, and explore additional cases:
Shamsher Khan
Iftikhar Ahmad
Mohammad Safdar
Rehana Samad
Azra Rafique and Zill-e-Huma

Prepare handouts for first day of facilitation workshop

Prepare formative evaluation for first two days of facilitation workshop

Begin final report

Prepare handouts for presentation on "Quality Management Transformation" at Human Resource Development Institute, Lahore

January 24 - Present first day of Facilitation of Case Studies workshop

Prepare case for presentation, "Basic Manufacture of Pharmaceutical Raw Materials"

Review, critique and key cases and teaching notes developed:
Karamat Azim, "Oil Industry Training Institute: Personnel Management and Manpower Planning"
Sajjad Mahmood and Naheed Riaz, "Eid Petition of Mr. Nayyar Abbas"

Review and critique case developed by Muhammad Amjad, "The Resource Dilemma, Part II"

January 25 - Present second day of Facilitation of Case Studies workshop

Collect completed formative evaluation sheets from workshop participants

Meet with Azra Rafique and Zill-e-Huma to discuss progress in collecting data for their case on Fertilizer Marketing Corp.

Meet with Shamsher Khan to discuss changes made in "Mehrpur Dam" case developed last summer

January 26 - Holy Day

Write introduction to case study publication

Begin work on case to be developed jointly with Iftikhar Ahmad on "Public Image of the Police and the Law and Order Situation"

January 27 - Make presentation on "Quality Management Transformation" to Human Resource Development Institute, Lahore, in course on "Managerial Innovation and Creativity"

Tally results of formative evaluation

Make changes in case developed last summer: "Mehrpur Dam" The Unfulfilled Promise," by Muhammad Amjad and Shamsher Khan

Review and critique case developed by Muhammad Safdar, "Socio-economic Development of Cholistan"

Prepare for role-play in "Oil Industry Institute" case to be presented tomorrow by Karamat Azim

Key appendices for case on "Eid Petition of Mr. Nayyar Abbas," developed by Sajjad Mahmood and Naheed Riaz

Update final report

January 28 - Review changes to be made in his case with Safdar before duplicating for distribution to faculty

Meet with Azra Rafique to review status of MIS cases with Pakistan International Airlines and National Fertilizer Marketing Ltd.

Meet with Karamat Azim to review respective roles for role play in case presentation today

Observe case presentations by Karamat Azim and Sajjad Mahmood, which were videotaped

Meet with Feroza Ahsan, Directing Staff, Pakistan Administrative Staff College, to discuss case to be facilitated by me on January 30

With Azra Rafique, meet with personnel at National Fertilizer Marketing Ltd. to gather data for a case on MIS: M. Shafi Malik, Finance Director; Maqsood Mukhtar, Senior Manager (Systems); and Abdul Ghanz Chaudhry, Systems Analyst

Make corrections in the case studies developed by Karamat Azim, and Sajjad Mahmood and Naheed Riaz

Review, edit, and key teaching note for "Eid Petition of Mr. Nayyar Abbas," developed by Sajjad Mahmood and Naheed Riaz

Review and begin preparation of case to be facilitated at Pakistan Administrative Staff College: "Purchase of Romanian Buses," by Khalid Jawed

January 29 - Review videotapes of yesterday's facilitation with Karamat Azim and Sajjad Mahmood, respectively

Review first draft of case on National Fertilizer Marketing Ltd. written by Azra Rafique

Observe case presentations by Rehane Samad and Mohammad Safdar

Attend luncheon at Human Resource Development

Institute, Lahore
Meet with Feroza Ahsan of Pakistan Administrative Staff College to view facilities and discuss final arrangements for case presentation tomorrow
Complete preparations for case presentation at Pakistan Administrative Staff College tomorrow
Review and critique Mansoor Mahmood's case, "Dismissal of a University Lecturer"
Develop summative evaluation form
Continue work on writing case on police situation

January 30 - Review videotapes of yesterday's facilitation with Rehane Samad and Mohammad Safdar, respectively
Locate case for Iftikhar Ahmed to use to practice facilitation
Facilitate case at Pakistan Administrative Staff College
Review, critique, edit and key teaching note developed by Karamat Azim
Draft recommendations for final report

January 31 - Observe case presentation by Shamsher Khan
Review videotape of facilitation with Shamsher Khan
Discuss with Mansoor Mahmood the need for further camouflage in his case
Review, critique and edit Azra Rafique's next draft of her case
Review final draft of both parts of Muhammad Amjad's case
Meet with Mushtaq Ahmad, AED-Lahore, for final debriefing
Have dinner with Director, NIPA-Lahore, Manzoorul Hasan

February 1 - Observe case presentations by Muhammad Amjad, Iftikhar Ahmed, and Azra Rafique
Administer summative evaluations
Continue work on final report
Travel to Islamabad to meet with John Tabor, Larry Kirkhart, Mohammad Talha, and Zara Ahmad, AED, for debriefing
Return to Lahore

February 2 - Review videotapes of yesterday's facilitations with Muhammad Amjad and Iftikhar Ahmed, respectively
Complete final report
Depart Lahore; arrive Karachi

February 3 - Depart Karachi; arrive Frankfurt
Depart Frankfurt; arrive New York City
Depart New York City; arrive Minneapolis/St. Paul

Post-Arrival - Complete final report
Complete case on police and law and order; write teaching notes

Complete edit on all cases and teaching notes from last summer and the present trip; mail completed manuscript to Muhammad Amjad no later than March 1

APPENDIX B

Programme for Case Study Workshop
January 21 to February 1, 1990

January 21, 1990 (Sunday)

11:00 a.m.	Tea with Dr. Gary N. McLean
11:30 a.m. to 12:30 p.m.	Dr. Gary N. McLean meets the faculty in Classroom No. 1
1:00 p.m.	Lunch

January 22, 1990 (Monday)

9:00 a.m. to 1:00 p.m.	Individual meetings with the faculty members
10:30 a.m. to 11:00 a.m.	Tea
1:00 p.m.	Lunch

January 23, 1990 (Tuesday)

9:00 a.m. to 1:00 p.m.	Individual meetings with the faculty members
10:30 a.m. to 11:00 a.m.	Tea
1:00 p.m.	Lunch

FORMAL START OF THE WORKSHOP

January 24, 1990 (Wednesday)

9:00 a.m. to 1:00 p.m.	How to teach a case (Dr. Gary N. McLean)
10:30 a.m. to 11:00 a.m.	Tea
1:00 p.m.	Lunch

January 25, 1990 (Thursday)

9:00 a.m. to 1:00 p.m.	Item 1: Facilitation of a case by Dr. Gary N. McLean Item 2: Assignments to the participants
10:30 a.m. to 11:00 a.m.	Tea
1:00 p.m.	Lunch

January 28, 1990 (Sunday)
January 29, 1990 (Monday)
January 31, 1990 (Wednesday)
February 1, 1990 (Thursday)

9:00 a.m. to 10:30 a.m.	Individual meetings with the faculty members to review videotapes and provide additional

	assistance on case development
10:30 a.m. to 11:00 a.m.	Tea
11:00 a.m. to 2:00 p.m.	Participants/Faculty facilitate cases to be videotaped
2:00 p.m.	Lunch

<u>January 30, 1990 (Tuesday)</u>

9:00 a.m. to 10:30 a.m.	Individual meetings with the faculty members
10:30 a.m. to 11:00 a.m.	Tea

Dr. McLean will not be available for the rest of the day as he has an appointment at the Pakistan Administrative Staff College.

(Iftikhar Ahmad)
Senior Instructor
21.1.1990

APPENDIX C - OUTLINE
CASE STUDY FACILITATION WORKSHOP
NIPA-Lahore, January 24-February 1, 1990
Gary N. McLean

Objectives

Upon completion of the workshop, participants will be able to:

1. Select an appropriate case for use;
2. Introduce the case method to students;
3. Use and introduce appropriate small group processes in discussing cases;
4. Facilitate large group discussion, keeping the class on track and maintaining good group process, but without controlling or directing the discussion;
5. Provide an appropriate summary of the case; and
6. Provide appropriate feedback to the group and to individual participants.

Workshop Outline

1. Factors to Consider in Selecting a Case for Use
   a. Availability
   b. Compatibility with course objectives
   c. Cultural appropriateness
   d. Knowledge and experiential level of facilitator
   e. Knowledge and experiential level of participants
   f. Time available
   g. Resources available: royalties, duplication, video, field trip, computers
   h. Availability of teaching notes

2. Introducing the Case Method to Students
   a. Approaches
      i. Individual student preparation and oral participation
      ii. Individual student preparation with written analysis
      iii. Small group preparation with individual oral participation
      iv. Small group preparation with consensus decision-making and one representative from each group participates in individual oral discussion
      v. Small group preparation with small group presentation

vi. Variants: Role playing
Guest experts
Panel discussions
Field trips
Computer simulations
Audio-visual

b. Handout: Effective Use of the Case Method of Instruction
c. Handout: How to Solve Case Studies--Student Notes
d. Videotape: A degree of understanding

3. Preparing to Facilitate a Case Study
   a. Read the case thoroughly
   b. Make marginal notations to identify important facts quickly
   c. If numbers are involved, make numerical calculations that students might think are significant
   d. Know the meaning of every term in the case
   e. Master the technical concepts included in the case
   f. Review teaching notes provided; if teaching notes are not provided, develop your own detailed teaching notes using all of the components of a good teaching note
   g. Anticipate all possible responses participants might give and know their possible consequences
   h. Make notes during facilitation to improve your preparation and facilitation the next time the case is used

4. Use of Small Group Processes in Case Discussions
   a. Brainstorm "Contract of Behaviour"
   b. Role of facilitator in small group processes

5. Facilitation of Large Group Discussions
   a. Videotape: A shared experience
   b. Brainstorm role of facilitator in large group discussions
   c. Handout: Suggestions for case discussion leaders (Law, 1964)

6. Summarizing Cases
   a. Brief summary of class discussion
   b. Lessons or principles learned from the case
   c. Points overlooked during discussion
   d. Alternative solutions not considered
   e. Actual outcome of the case, if known

7. Providing Feedback to Participants
   a. Group
   b. Individual - Immediate
      - Consultation
   c. Written assignments
   d. Grading?

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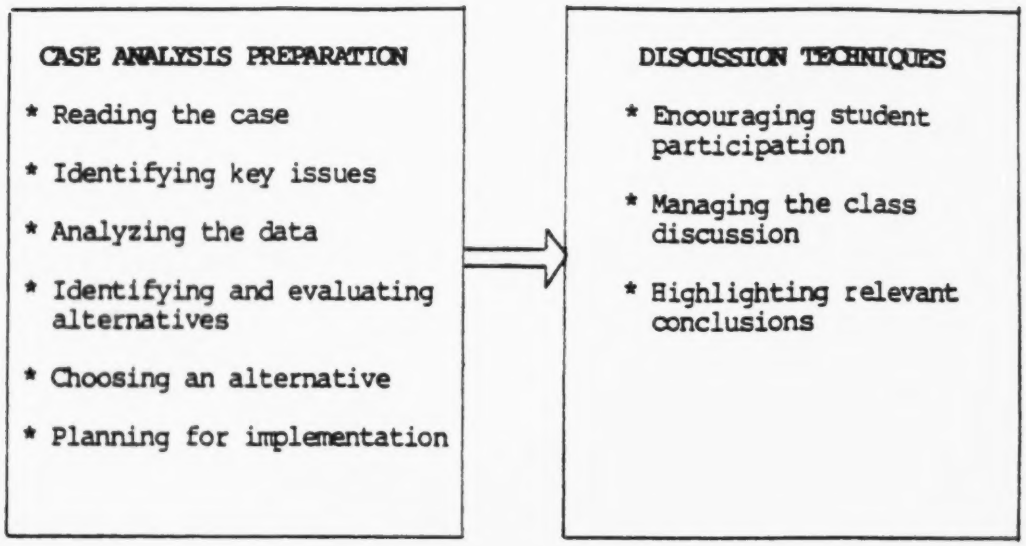
APPENDIX D - HANDOUTS

Figure 1

Effective Use of the Case Method of Instruction



HOW TO SOLVE CASE STUDIES—STUDENT NOTES

Each of the case studies selected for this course deals with a different problem and a different cast of characters. The case reports what has happened to a given point in time. Facts reported in the situation cannot be recast or changed in any important degree. The descriptive materials have been prepared generally in objective form without intruding value judgments on the worth of what has happened thus far. Readers may very well find themselves introducing such personal value judgments on the basis of experience or insight into the situation. It is important, however, to identify the facts which are relevant and those which are irrelevant.

In analyzing the case study, the student is expected to work forward beyond the close of the written account in ways that promote the resolution or alleviation of the major problem(s) or issue(s) involved rather than to look backward from results to decisions which have been made by others. The analyst needs to introduce himself or herself into the situation, typically playing a self-selected role in each case. This means that future developments can take a variety of approaches with differing outcomes depending upon the new mix of individuals involved and the decisions or actions taken. Important, too, are the goals sought, the decisions, action and skills identified for use by the participant in handling the processes which may be involved.

Because of these potential changes in goals, processes, roles, and individuals, the analysis of the case study can also take a variety of forms. The suggestions which follow are intended to be helpful and to identify minimum topics which should be treated in the case analysis. Feel free, however, to depart from this suggested format when either the case or your analysis of it indicates a different approach. Whatever approach is used, seek to identify the major problem or problems, goal or goals which should be sought, and actions or decisions which will enable you to handle or resolve the problem situation constructively in light of your identified goals.

1. Brief Case Description. What appear to be the most relevant facts in the case situation? Who are the major participants and how are they related to the problem and each other? (Caution: This should be brief. In a written analysis, this section is usually no more than a paragraph or two.)

2. Principal Problem and Goal. Identify the problem or issue which you consider to have highest priority and the goal which you seek to attain in handling this problem or issue. In some instances you may need to identify also some peripheral or tangential problems which restrict your choice of possible solutions or which enhance the overall resolution of the problem rather than other discarded alternatives which are identified in #3 below.

3. Alternatives That Might Have Been Taken Earlier. Despite the fact that the situation cannot be restructured, a bit of speculation on what went wrong in the situation may prove of value. Resist the temptation to

spend too much time on this other than to develop clues which might lead to differing choices of possible next steps.

4. Next Steps. What should be done next? What alternatives in action or decision appear to be plausible? Which of these is likely to have the most constructive effect in alleviating the principal problem or issue as well as those identified as tangential? Be sure to state the steps or procedures which you would follow in your self-appointed role.

5. Effects. What are the likely outcomes of such decisions or actions? Keep in mind the status, competence, and relationship of the principal characters including yourself in the case and the goal or goals which you seek in this situation as identified earlier. This description could well include corrective actions which might help to reduce some of the negative effect or effects.

ROLES OF THE CASE STUDY FACILITATOR IN LARGE GROUP DISCUSSION

> Just as one of the virtues of a good case discussion is that it demonstrates that there is no single, demonstrably correct solution to most problems, it is also true that there is no stereotype of a perfect case discussion leader. (Law, 1964, p. 4)

Determining physical arrangements
Beginning sessions: Greetings, announcements, general comments, followup to previous classes
Discussion of readings and theoretical concepts
Introduction to case
Personal anecdote
Where case fits in course sequence
Relate to press
Purpose (objectives) of case
Framework for discussion
Setting/getting consensus on ground rules
Asking questions
Helping the class make assumptions when necessary
Play the role of "devil's advocate" when there is little disagreement among participants
Participate in brief two-person role plays to clarify participant responses
Using chalkboard/whiteboard to record responses
Maintaining/sharing control of classroom
Distributing participation--"traffic cop"
Listening to and encouraging participants (avoid condescension, sarcasm, intolerance, or intellectual censorship)
Modeling accepting behavior for participants
Using experiences of participants
Seeking clarification
Clarifying facts
Introducing concepts and techniques; technical notes
Paraphrasing participant discussion
Giving information--"the expert"; is this role ever appropriate?
Summarizing--formative and summative

SAMPLE CONTRACT FOR GROUND RULES

Begin and end at assigned times
No interruptions, unless one person is dominating
Approximately equal participation
No more than three comments in a session (if a dominant personality)
Leadership is shared
No personal attacks
Disagreement is acceptable and to be encouraged
No "put-down" of answers via sarcasm, insult, etc.
Each contribution is to be acknowledged; no "plops"
Use names
Listen
Periodically, provide feedback on process
Each person comes prepared
Decisions by consensus
Contract is open-ended

APPENDIX E
REACTION FORMATIVE EVALUATION
Case Facilitation Workshop
Activities of January 24-25, 1990

Using the following scale, circle the number to the right of each of the following statements to indicate the degree to which you agree or disagree with the statement as it relates to the first two days' activities:

5 = Strongly Agree
4 = Agree
3 = Neutral or Not Sure
2 = Disagree
1 = Strongly Disagree

1. The review of the process of facilitating a case was helpful.	5	4	3	2	1
2. The review of small group processes was useful.	5	4	3	2	1
3. The videotapes on case teaching were helpful.	5	4	3	2	1
4. The demonstration of case facilitation was helpful.	5	4	3	2	1
5. McLean used good facilitation skills.	5	4	3	2	1
6. I could understand McLean's pronunciation.	5	4	3	2	1
7. The handouts were useful.	5	4	3	2	1
8. The terminal objectives for the workshop are appropriate.	5	4	3	2	1
9. The design proposed to accomplish this objective is appropriate.	5	4	3	2	1
10. McLean is knowledgeable about case facilitation.	5	4	3	2	1
11. Overall, I am satisfied with the first two days' activities.	5	4	3	2	1

12. Here's what I liked best about the first two days' activities:

13. Here's what I didn't like about the first two days' activities:

14. Here's what I'd like to have included during the rest of the workshop:

Use the back of this page for any additional feedback you'd like me to have. Thanks for helping.

APPENDIX F
REACTION FORMATIVE EVALUATION RESULTS
Case Facilitation Workshop
Activities of January 24-25, 1990
(n = 10)

The following scale was used to indicate the degree to which participants agreed or disagreed with the statement as it related to the first two days' activities: 5 = Strongly Agree
4 = Agree
3 = Neutral or Not Sure
2 = Disagree
1 = Strongly Disagree

		5	4	3	Mean
1.	The review of the process of facilitating a case was helpful.	7	3		4.7
2.	The review of small group processes was useful.	8	2		4.8
3.	The videotapes on case teaching were helpful.	1	6	3	3.8
4.	The demonstration of case facilitation was helpful.	8	2		4.8
5.	McLean used good facilitation skills.	10			5.0
6.	I could understand McLean's pronunciation.	7	3		4.7
7.	The handouts were useful.	7	3		4.7
8.	The terminal objectives for the workshop are appropriate.	6	3	1	4.5
9.	The design proposed to accomplish this objective is appropriate.	7	3		4.7
10.	McLean is knowledgeable about case facilitation.	9	1		4.9
11.	Overall, I am satisfied with the first two days' activities.	6	4		4.6

12. Here's what I liked best about the first two days' activities: (n = 9)
    Case Study Teaching Methods - 3
    Demonstration of Case Study Facilitation - 3
    Small Group Processes - 2
    Brainstorming
    Realistic Style
    Free and Frank Discussion
    All of the Sessions
    Videotapes
    Learning Environment

13. Here's what I didn't like about the first two days' activities: (n = 1)
    Late Start

14. Here's what I'd like to have included during the rest of the workshop: (n=6)
    Fine as circulated
    More time for discussion of cases
    Help in writing and identifying new areas for cases - 2
    More demonstrations and role plays by the staff
    More participation

Additional Feedback: None

APPENDIX G
REACTION SUMMATIVE EVALUATION
Case Facilitation and Development Workshop
January 22 - February 1, 1990

Using the following scale, circle the number to the right of each of the following statements to indicate the degree to which you agree or disagree with the statement as it relates to all of the activities that have been a part of this workshop:

5 = Strongly Agree
4 = Agree
3 = Neutral or Not Sure
2 = Disagree
1 = Strongly Disagree

The terminal objectives for the complete workshop were to develop an additional case study with a teaching note to be used in a specific phase of the Advanced Management course and to improve ability to facilitate case studies.

1.	During the workshop I improved my ability to develop a case.	5	4	3	2	1
2.	During the workshop I improved my ability to write teaching notes.	5	4	3	2	1
3.	During the workshop I improved my ability to facilitate a case.	5	4	3	2	1
4.	McLean used good facilitation skills throughout the workshop.	5	4	3	2	1
5.	McLean provided useful feedback throughout the workshop.	5	4	3	2	1
6.	The design proposed to accomplish these objectives was appropriate.	5	4	3	2	1
7.	I am committed to completing at least one more case during the next year.	5	4	3	2	1
8.	I am committed to applying the principles of case facilitation next time I facilitate a case.	5	4	3	2	1
9.	McLean is knowledgeable about case facilitation.	5	4	3	2	1
10.	McLean is knowledgeable about case development.	5	4	3	2	1
11.	Overall, I am satisfied with the workshop.	5	4	3	2	1

PLEASE TURN PAGE OVER

12. **Here's what I liked about the workshop:**

13. **Here's what would have improved the workshop:**

14. **Any additional feedback you'd like me or AED to have.**

APPENDIX H
REACTION SUMMATIVE EVALUATION RESULTS
Case Facilitation and Development Workshop
January 22 - February 1, 1990
(n = 10)

The following scale was used to indicate the degree to which participants agreed or disagreed with the statement as it related to all of the activities that were a part of this workshop:

5 = Strongly Agree
4 = Agree
3 = Neutral or Not Sure
2 = Disagree
1 = Strongly Disagree

The terminal objectives for the complete workshop were to develop an additional case study with a teaching note to be used in a specific phase of the Advanced Management course and to improve ability to facilitate case studies.

		5	4	3	2	1	NR	Mean
1.	During the workshop I improved my ability to develop a case.	4	4	2				4.2
2.	During the workshop I improved my ability to write teaching notes.	5	2	2	1			4.1
3.	During the workshop I improved my ability to facilitate a case.	6	2	2				4.4
4.	McLean used good facilitation skills throughout the workshop.	10						5.0
5.	McLean provided useful feedback throughout the workshop.	10						5.0
6.	The design proposed to accomplish these objectives was appropriate.	6	4					4.6
7.	I am committed to completing at least one more case during the next year.	3	1	4		1	1	3.6
8.	I am committed to applying the principles of case facilitation next time I facilitate a case.	5	2	3				4.2
9.	McLean is knowledgeable about case facilitation.	10						5.0
10.	McLean is knowledgeable about case development.	10						5.0
11.	Overall, I am satisfied with the workshop.	6	3	1				4.5

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12. Here's what I liked about the workshop:

McLean's facilitation - 3
Wide participation - 2
Informal atmosphere
Case study facilitation techniques
Very educational
Dr. McLean's attitude
Encouraging behaviour
Comprehensive
Tailored to teaching needs of professional trainers
"Making the teacher and participants deeply involved in the process of facilitation"
Writing case
Brainstorming

13. Here's what would have improved the workshop:

Better in-house facilities
More time
More practice at facilitation
Provide feedback in large group so we could contribute and all learn from the feedback

14. Additional feedback:

"Continue to organize such useful courses to improve our teaching skills"
"A happy experience to work with Dr. McLean"
More case workshops
"It was extremely well done"
"An ideal teacher"
"Continued contact by McLean with NIPA faculty to encourage them to develop their cases and help in editing and publishing"
"Thanks to AED and McLean"